

RECEIVED  
SECRETARY OF THE SENATE  
Date/Time PUBLIC RECORDS

2019 APR -8 PM 3:58

## COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

**Instructions:** Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Sam Hattap

Employing Office/Committee: Sen. Rob Portman

Travel Expenses Paid by (List all sources): Jobs for the Future (JFF) Lumina Foundation, Tu Joyce Foundation

Travel Date(s): February 21-22, 2019

Description/Title of Attached Forms: Private Sponsor Travel Certification Form

Purpose of Amendment (describe the reason for amending original submission): I was not given the right form from the sponsor for my original submission. They since sent me this new one.

4/8/19  
(Date)

[Signature]  
(Signature of Traveler)

# PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

**This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.**

**The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.**

1. Sponsor(s) of the trip (please list all sponsors): Jobs for the Future (JFF), Lumina Foundation and The Joyce Foundation.
2. Description of the trip: The Congressional Staff Network Site Visit to Memphis, TN to examine high quality and innovative education, workforce and poverty alleviation programs. See attachments for detail.
3. Dates of travel: February 21, 2019 - February 22, 2019
4. Place of travel: Memphis, TN
5. Name and title of Senate invitees: See attachments for more detail.
6. I certify that the trip fits one of the following categories:  
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.  
~~OR~~  
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  
~~AND~~  
☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:  
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.  
~~AND~~  
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

**SECRET**







21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The lodging expenses will equal the government per diem rate for Memphis, TN in February. The meal expenses will be less than the government per diem rate for Memphis, TN in February.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Round trip coach class commercial airfare will be provided from DC to Memphis. In addition, a chartered bus service is reserved for two days of ground transportation.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

NONE

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Maria K. Flynn

**Name and Title:** Marla Flynn, President/CEO

Name of Organization: Jobs for the Future (JFF)

**Address:** 122 C st NW Washington, DC 20001

**Telephone Number:** 617-728-4446

**Fax Number:**

**E-mail Address:** [mflynn@jff.org](mailto:mflynn@jff.org)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM  
SIGNATURE PAGE FOR ADDITIONAL SPONSOR  
(to be completed by each additional sponsor)

I hereby *certify* that the information contained on pages 1-4 of the certification form and any  
accompanying addenda, all submitted in connection with the 2/21/2019 - 2/22/2019 trip

to Memphis, TN is true, complete, and correct.  
Place of Travel

Signature of Travel Sponsor: Ellen Alberding 1-16-2019

Name and Title: Ellen Alberding, President

Name of Organization: The Joyce Foundation

Address: 321 North Clark St. Suite #1500 Chicago, IL 60654

Telephone Number: 312-782-2464

Fax Number: \_\_\_\_\_

E-mail Address: swilkins@joycefdn.org

00000000001377

# PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

**SIGNATURE PAGE FOR ADDITIONAL SPONSOR**

*(to be completed by each additional sponsor)*

I hereby *certify* that the information contained on pages 1-4 of the certification form, and any

to Memphis, TN

Dates of Travel (Month Day, Year)

**Signature of Travel Sponsor:**

**Name and Title:**

**Name of Organization:**

**Address:**

**Telephone Number:**

**Fax Number:**

**E-mail Address:**

CC  
F-  
NN  
F-  
CC  
CC  
CC  
CC  
CC  
CC  
CC  
CC  
CC



## **Attachments**

### **Congressional Staff Network for Economic Advancement February 21, 2019 – February 22, 2019 Memphis, TN**

#### **Question #2 Description of the Trip:**

The Congressional Staff Network for Economic Advancement brings together a bicameral, bipartisan group of senior Congressional staff to focus on policy issues at the core of economic mobility: K-12 education, postsecondary education, workforce development, and poverty alleviation. The purpose of this trip is to examine high quality and innovative education and workforce training programs that focus on the economic needs of the city, its employers and its people. Staff will see innovative programs that meet the skill needs of the region's critical industries, talk with students, teachers, state and local officials and employers who are involved in the development and in carrying out these programs.

#### **Question #5 Senate Staff:**

Adzua Agyapo, Legislative Fellow, Office of Senator Bennet

Jake Baker, Professional Staff, Senate HELP Committee

Kendrick Davis, Policy Advisor, Office of Senator Harris

Sam Hattrup, Legislative Correspondent, Office of Senator Portman

Rebecca Howard, Legislative Assistant, Office of Senator Jones

Lot Kwarteng, Legislative Assistant, Office of Senator Stabenow

Lindsay Linhares, Senior Policy Advisor, Office of Senator Hyde-Smith

Ryan Martin, Senior Human Services Advisor, Senate Finance Committee

Katherine McClelland, Workforce and Education Policy Advisor, Senate HELP Committee

Karishma Merchant, Senior Education Policy Advisor, Office of Senator Tim Kaine

Marisa Morin, Policy Fellow, Office of Senator Wyden

Cortney Segmen, Legislative Correspondent, Office of Senator Kaine

Brittany Weaver, Legislative Assistant, Office of Senator Hassan

#### **Question #12 Role of Sponsor:**

Jobs for the Future (JFF), Lumina Foundation and The Joyce Foundation work together to select sites and topics of interest around which to base site visits and forums, considering congressional staff interest, the quality of programming, and whether or not these



programs have a relationship to workforce development, education policy and poverty alleviation. The sponsors develop and execute the agenda and arrange logistics for the trip. JFF serves as the point of contact for staff.

**Question #13 Mission of Sponsors:**

JFF's mission is the development of education, training and supportive programs and policies that expand opportunities for low income and disconnected youth and adults to attain the education, training and credentials necessary to find good jobs and family sustaining careers. Lumina Foundation's mission is the commitment to making opportunities for learning beyond high school available to all: envisioning a system that is easy to navigate, delivers fair results, and meets the nation's need for talent through a broad range of credentials. The Joyce Foundation's mission is investing in public policies and strategies to advance racial equity and economic mobility for the next generation. All three sponsors' work is informed by research, analysis, and best practice. JFF's, Lumina Foundation's and The Joyce Foundation's missions align with the purpose of the trip, learning and highlighting programs that expand opportunities for all through education, workforce development and poverty alleviation policy.

**Question #14 History of Sponsor:** The Congressional Staff Network has sponsored site visits and DC based forums for over 10 years. Examples of this work include the following: site visits where senior congressional staff have examined high quality workforce programs and learned from experts and practitioners on the ground, about the impact of federal policy in their fields of responsibility: Charlotte, NC; Bridgeport, CT; Cincinnati, OH; Madison, WI; Philadelphia, PA; Detroit, MI, Wichita, KS, Nashville, TN, Seattle, WA, Eastern KY, Fredericksburg, VA; and a second visit to Detroit, MI. The purpose of these trips (and the Network) is to provide in-depth learning opportunities for staff on workforce, education, and poverty alleviation issues. Last year, Lumina Foundation and The Joyce Foundation were co-sponsors, playing a substantive role in the planning and development of the Congressional Staff Network site visit. Lumina Foundation and The Joyce Foundation co-sponsored a similar trip in August, 2018 to Detroit, MI. Prior to that visit JFF was the sole sponsor.

**Question #15 Other Educational Activities of Sponsor:**

JFF works with partners around the country to design and drive the adoption of education and career pathways leading to college, career readiness and career advancement for those struggling to succeed in today's economy. JFF improves pathways from high school to college to family-sustaining careers through relevant technical assistance, research, publication of reports, and hosting events (including national conferences) and engaging in policy analysis. Lumina Foundation is working with partners to bring greater transparency to all credentials and better serve underrepresented communities through: robust communication - providing daily newsletters to the public which highlight Lumina's recent publications as well as other publications that are relevant to their mission; and funding projects that research and implement (through technical assistance) best practices around education, training and overall skill development throughout the nation. Lumina Foundation's work supports smoother student transitions and creative, flexible pathways for all learners. The Joyce Foundation supports policy research, development and advocacy





FOR ECONOMIC ADVANCEMENT

## AGENDA

**Thursday, February 21, 2019 – Friday, February 22, 2019**  
**Site Visit to Memphis, Tennessee**

Thursday February 21<sup>st</sup>

8:50 – 10:31 AM Staff Flies to Memphis TN  
8:50 AM to 10:31 AM American 4483

**10:45 – 11:15 AM**     **Transit from Airport to Lunch session**  
*Central BBQ Downtown Location*  
*147 E Butler Ave Memphis TN*  
*38103*

11:15 AM      Lunch session  
Central BBQ Downtown Location

**11:30 – 1:00 PM      An Introduction to Memphis**

Luncheon speakers will provide an overview of the Memphis region: the economy; its demographic characteristics; its challenges in addressing poverty and equity issues; its education and workforce development efforts; and opportunities that lie ahead. As part of this session, speakers will discuss strategies and changes underway that are designed to ensure that education and workforce development programs meet the skill needs of the region's high demand industry sectors and are accessible to all individuals in the region. This discussion will also focus on the role that federal resources (e.g., TAACCCT, America's Promise grants) have played in helping local stakeholders to rethink workforce development and postsecondary education efforts for the region. Speakers will also provide an overview of the site visit.

**Speakers:**

**Reid Dulberger**, President, EDGE and the Greater Memphis Alliance for a Competitive Workforce (GMAC)

**Dr. Elena Delavega**, Professor, University of Memphis

**Shante Avant**, Chair, Shelby County School Board and Deputy  
& Director, Women's Foundation for a Greater Memphis

**Alan Gumbel**, Interim Executive Director, GMAC

1:00 – 1:30 PM      Travel to Smith & Nephew  
1450 E Brooks Rd, Memphis TN 38116





FOR ECONOMIC ADVANCEMENT

1:30 – 3:00 PM

Smith & Nephew – Employer Panel on Regional Investment, Sector Initiatives and Tour of Medical Device Manufacturer

During this session staff will tour the Smith and Nephew medical device company – an advanced manufacturing company that represents the region's leading manufacturing industry, medical device manufacturing. After a 30 minute tour where staff will have opportunities to talk with workers and see the facility, they will hear from an employer panel with representatives from Smith & Nephew, The Bartlett Chamber and the Medical Device Council to hear about how regional employers are investing in the region's workforce and engaging in sector initiatives to build skilled worker pipelines in the region's key industry sectors. Smith & Nephew will discuss their involvement in the local medical device council (a regional sector partnership) and about how the America's promise grant program (a federal DOL grant) has positively impacted these efforts.

Speakers:

**Gene Baker**, Vice President of Operations, Smith & Nephew

**John Threadgill**, President, Bartlett Chamber of Commerce

**Roy Smith**, President, Memphis Medical Device Council

**Willis Yates**, President, Y & M Technologies

3:00 – 3:30 PM

Travel to Civil Rights Museum

*450 Mulberry St. Memphis, TN 38103*

3:30 – 5:00 PM

The Role that the Civil Rights Movement has Played in Memphis

The city of Memphis has played a pivotal role in the U.S. civil rights movement. This session taking place at the museum will discuss how the civil rights movement impacted Memphis, from its history and economy into today. From the thriving neighborhood of Old Beale Street, to the U.S. Civil Rights Museum, the location of the assassination of Dr. Martin Luther King Jr. in 1968, Memphis has played a big role in American history. While great strides have been made in the city, efforts continue to focus on equitable access to good jobs and economic prosperity through the region's education, workforce, poverty alleviation, and economic development efforts.

Speakers:

**Ryan Jones**, Museum Educator, National Civil Rights Museum

**Dory Lerner**, Museum Educator, National Civil Rights Museum

MEMPHIS





FOR ECONOMIC ADVANCEMENT

5:00 – 5:30 PM Travel back to hotel & Check - in  
*The Peabody Hotel*  
*149 Union Ave. Memphis, TN 38103*

**7:00 – 8:30 PM**      **Dinner Session on State Initiatives**  
***The Peabody Hotel***  
***149 Union Ave. Memphis, TN 38103***

Staff will hear from regional representatives from Pathways TN, TN Promise, and TN Reconnect on how state initiatives are being implemented in Memphis. This conversation will include information on funding streams and outcomes these programs have seen on a regional and state level from their work.

**Speakers:**

**Dr. Robin Cole**, Dean of Department of Business & Technology, Southwest Tennessee Community College

**Roland Rayner**, President, Tennessee College of Applied Technology (TCAT)

**Jerre Maynor**, Director of Student Readiness and Pathways, The Broad Center

**Rep. Mark White**, Chair of House Education Committee, TN House District 83

**Rep. Karen Camper**, Leader of House Democratic Caucus, TN House District 87

8:30 PM                      Programming ends

Friday February 22<sup>nd</sup>

**8:00 – 8:30 AM      Check Out of Hotel**

**8:30 – 9:30 AM**      **Breakfast Session: A conversation with city and county Mayors**  
*The Peabody Hotel*  
*149 Union Ave. Memphis, TN 38103*

**Speakers:**

- **Mayor Lee Harris, Shelby County**
- **Mayor Jim Strickland, Memphis**

The breakfast meeting will focus on how city and county governments work together to solve challenges facing the region, and the roles that education and workforce development play in building the regional economy as well as providing economic opportunities (ensuring equity) for all residents of Memphis and Shelby County. Mayor Harris will provide an update on the status



of the Shelby County workforce development system as it transitions to a regional workforce system.

This session will focus on neighborhood redevelopment, inclusion and equity. Staff will be driven through a local Hope 6 Neighborhood and hear about work the Memphis Housing authority is doing as a result of their Federal Job Plus Grant and their Choice Neighborhood grant.

**Marcia Lewis**, Director, Memphis Housing Authority  
**Paul Young**, Director of Housing and Community  
 Development, City of Memphis

During this session staff will hear from local non-profits, philanthropic organizations, and the local workforce board (WIN) who are working on varied poverty alleviation efforts including workforce development, adult education, opportunity youth, and reentry programs. Staff will hear about efforts to prepare targeted populations for success in the local labor market and strategies to provide access to high demand opportunities.

**Desi Franklin**, Chair of Board of Directors, Workforce Investment Network (WIN)  
**Julie Sanon**, COO, Agape  
**Rob Brown**, Fellow, The Collective  
**Ron Wade**, Executive Director, Hopeworks  
**Deandre Brown**, Executive Director, Lifeline to Success  
**Alexandria Smith**, Former Opportunity Youth, City of Memphis

**12:00 – 1:30 PM**      **Lunch Session: T-STEM meeting**  
*University of Memphis' FedEx Institute of Technology*  
*365 Innovation Dr. Memphis, TN 38152*



Working lunch where staff will hear from representatives from postsecondary education on how they are preparing students for Memphis' transportation and logistics industry, discussing the satellite campus, a Transportation, Science, Technology, Engineering and Math (TSTEM) Highschool (that focuses on transportation) and efforts to better recruit students into STEM fields. Speakers will discuss how systems are working together to increase student interest, outcomes and persistence in these fields.

**Dr. Stephanie Ivey**, Fellow and Professor, University of Memphis

**Travel to Southwest Tennessee Community College Health Campus**  
*Union Avenue Campus*  
*737 Union Ave. Memphis, TN 38103*

## Preparing Students and Workers for the Healthcare and Biotech Industry

**Dr. J. Racquel Collins**, Graduate School of Biomedical Sciences, St. Jude

**Beverly Robertson**, Interim President/CEO, Greater Memphis Chamber of Commerce

Wrap Up  
Same location as last panel

## Travel to airport



**CONGRESSIONAL  
STAFF NETWORK**

FOR ECONOMIC ADVANCEMENT

5:30 PM

Return flight to DC

*Memphis → DCA 6:19 – 9:20 PM. American 5539*

00000000001387



